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AUTHOR Greenblatt, Sadelle T.
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ABSTRACT

Little Brothers--Friends of the Elderly is a non-profit, non-sectarian federation of agencies devoted to meeting the needs of the elderly poor, those poor not merely in worldly goods, but in love. The organization examined how it might more effectively spread its services and assure the establishment throughout the United States of programs with its philosophy. After determining that the organization had a mission to expand, the mission and philosophy statements were examined to assure that they expressed the goals of the organization. Next the structure that would be necessary for expansion was considered. Past experiences in setting up the four existing sites were reviewed, using a survey of volunteers, interviews with the individuals who had set up the sites, and census and other secondary data. Factors resulting from these efforts were operationalized and measured, thereby creating a financial program viability measure. Acceptance by the Area Agencies on Aging and United Way agencies in areas under consideration was assessed using letters asking whether agencies believed there was a need for Little Brother services. These screening procedures along with on-site evaluations will be used to determine locations of new sites. This example illustrates how an agency can use a research approach to planning for future program changes. (ABL)

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PLANNING AND RESEARCH FOR PROGRAM EXPANSION

Sadelle T. Greenblatt
Little Brothers-Friends of the Elderly

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Planning and Research for Program Expansion

When an agency stops to take a look at itself, to evaluate not only its programs, but the way in which it fulfills its mission, there is almost always a feeling of "we could be doing more." And, if that judgement is followed by a determination to try to do so, research and planning go hand in hand toward that purpose. It is the joint planning effort engaged in by staff and Board that permits the focus on mission and philosophy, that identifies the things not done that should be done -- the why, what and for whom. With input from research, it becomes easier to plan the how, where, and when.

An example of that partnership between research and planning is drawn from the experience of Little Brothers-Friends of the Elderly, the United States affiliate of the Little Brothers of the Poor. The agency originated as a pious union of laymen in France in 1949. Little Brothers of the Poor is now a not-for-profit, non-sectarian federation of agencies located in seven countries. The founders devoted the organization to meeting the needs of the elderly poor -- those poor not merely in worldly goods, but in love. They stated their mission was to serve through being loving friends, making the lives of our "old friends" fuller and more joyous with visits, celebrations, trips, and gifts that provided more than the utilitarian, that offered some of

life's beauty. It is to this that our motto of "Flowers before bread" refers. Perhaps their language sounds strange today, but Little Brothers was not a professional organization, and the language they used reflected that. Professionals today would speak of "improving the quality of life of the isolated elderly through provision of social relationships and activities." But in the translation to professionalese, they would lose the essence of the Little Brothers of the Poor philosophy -- the caring and the emphasis upon the unique worth and dignity of each individual.

With this kind of philosophy, and with a sense of mission, in 1985, the staff and Board of Little Brothers-Friends of the Elderly began to look at how the organization might more effectively spread its services and assure the establishment throughout the United States of programs with the philosophy they believe is so important for maintaining the dignity, self-worth and happiness of the elderly.

The first step was to indeed determine that this agency -- both Board and Staff -- believed that it had a mission to go beyond its current four sites and to spread the program philosophy more fully over the country. Once that was clearly established, the next step was to look again at the mission and philosophy statements to make sure that they truly expressed the goals of the organization, and could act

as guides for the program expansion. With this, the next step was defining the target population and the core services -- those services which every Little Brothers Friends of the Elderly program would provide regardless of what other services they might add.

The next task was to consider the structure that would be required if Little Brothers was to have a large number of sites, and the basic policies that would define the relationship of new sites to the National Office.

Little Brothers chose to serve persons 65 and older who were lonely and isolated. Another kind of agency might have selected another target population. For example, a child welfare agency might have chosen to serve children between the ages of six and twelve who were currently in group care. Little Brothers identified its core services as home visiting and holiday activities. A child welfare agency might have identified foster care and adoption. The point is, whatever the agency, the process is the same; what is different is what is chosen as mission and philosophy and as target population and core program.

At this point, then, the Agency knew what it wanted to do, how and for whom it wanted to do it. But it needed to know some things before it could decide where to do it. And research could provide much of the information upon which to

base that decision. Research was asked to develop and apply criteria for site selection. The questions to be answered were:

- who are the people who volunteer in our program and why do they do so;
- what are the factors that enable a new program to survive and grow;
- what factors determine whether a given locality will support the program;
- how can we assess, or measure, whether these factors are present in a community;
- what are the characteristics of staff that enable them to go into a new community and get a program started.

For other agencies or programs, some of the questions might have been the same; some would surely differ. Researcher, staff and Board have to work together to formulate the right questions, the ones that would generate the information that is needed for the particular agency's planning. Once the questions are determined, the ways to find their answers can be chosen.

A major concern for Little Brothers was to review its experience in setting up the existing four sites in the United States in order to learn from that experience, and to use it to guide our planning for the efficient establishment of the new programs. We had the experience of setting up

programs in Chicago, Boston, Minneapolis/St. Paul and Houghton County, Michigan, of recruiting large numbers of volunteers to provide services; but that experience had never been recorded in a way that could be used for planning. That knowledge was stored in the minds and memories of staff and volunteers. It had to be collected and organized before it could be used.

Four sources of data were used to get the answers to Little Brothers' questions. These were: a survey of a random sample of volunteers from all four sites; in-depth interviews with the individuals who had set up the four sites currently operating in the United States and with the current directors of these sites; census and other secondary data; and responses to letter requesting information from Area Agencies on Aging and United Ways in the cities that were being considered as possible sites.

The volunteer survey was a weighted random sample of volunteers in each of the four program sites, including about 100 volunteers from each site. While the researcher developed the first version of the questionnaire, questions were revised or added at the request of agency staff, so that the survey would also provide some guidance for them in their plans for future volunteer recruitment efforts.

The survey included both closed and open-ended questions. A double envelop procedure was used so that it was impossible to match the response to the respondent. Each response was sealed in a blank envelope inside another envelope bearing the respondent's name and address. Once the outer envelope was checked off the list of subjects, it was discarded, and all inner envelopes were opened as a group. This procedure was explained to the volunteers in the letter that accompanied the survey instrument. The questionnaire was mailed to all subjects, and those who did not respond within two weeks received a second mailing. We achieved a response rate of over 55%, a high rate for a mail survey, but the margin of error is still larger than it would have been had we been able to schedule in-person interviews. However, neither the time nor the manpower was available for in-person interviews with 400 volunteers. Data from the volunteer survey told us about the characteristics of Little Brothers volunteers and why they volunteered. This could guide efforts to recruit volunteers in a new community.

In-depth interviews with the founding and current site directors explored their opinions about the critical factors that contributed to the successful initiation and maintenance of a site. We asked about how they went about recruiting volunteers, donors and old friends; what they saw as critical turning points in the development of the site; what kinds of knowledge or expertise were needed and must

these reside in staff or could they be provided by volunteers or consultants; what were important characteristics for staff assigned to set up new sites; what was minimum staff size to start with; what local knowledge about the new city was necessary; how and when could fund-raising be initiated; what was the minimum amount of the first year budget; what things had to be addressed first, what next and what last; how had the site they worked in been chosen, and was that a good choice and why or why not.

In the preliminary planning, the decision had been made to initiate the next sites in the central cities of major metropolitan areas with populations of one million or more and in States with a large number and high percentage of their population aged sixty-five or over. 1980 census data was used to identify these cities. There were 27 such cities, but three of those already had operating sites. These were eliminated from the list. We also eliminated New York from consideration on the basis of its complexity and the multitude of agencies and services already there. Therefore, we had 23 cities from which to chose.

The information from the site directors had told us that the critical factors in selecting a site were related either to need for service or to potential program viability. Program viability is determined by the resources and support that are, or can be made, available to the program. These

include not only money, equipment and space, but also community support. For any agency, the need and viability criteria are critical considerations for program planning, and a way to identify and assess these are essential. There also must be some thought as to how they are to be applied.

For Little Brothers, these factors were operationallized into measurable criteria, and an acceptable range set for each that would include about two thirds of the sites being considered.

A number of criteria were developed to measure need for Little Brothers service: 1. Since our target population is the lonely or isolated elderly, we needed some measure, direct or indirect, of the number of these in a community. Census data on the number of persons aged 75 or over and living alone was used as a surrogate measure for the number of isolated aged. While not all people who have these characteristics are lonely, this is the population most vulnerable to loneliness, and the proportion of these who are lonely is not likely to vary significantly from city to city. Therefore, a comparative rating can be assumed. 2. Because rapid growth of a population often leaves the service system unable to catch up with increased service need, the growth rate of this population was another surrogate measure for service need. 3. Individuals with fewer financial resources may find it harder to obtain the

services they need, therefor the poverty rate among the local aged is also used as a service need criterion. 4. If the local needs assessment mentions isolation or loneliness, this is an indicator of the recognition of the need for service. 5. If in addition, the description of locally available services does not include any programs that offer a long-term relationship, this combination indicates a need for our service.

Measures for the financial viability of the program were also developed: 1. Since the agency fund-raiser indicated that the donor population is believed to be heavily Catholic and that Catholics appear to give larger contributions to Little Brothers than do other groups, the proportion of the local population that is Catholic is one viability criterion. 2. Since our volunteers appear to have higher than average income, median family income is another criterion. 3. The cost of doing business in a given locality can have a real effect upon whether sufficient funds are available to operate a program. Cost of living data are not available for each of the cities under consideration, but a comparative measure of salary levels is. This is used as a surrogate measure for cost of operation. 4. Since a closely clustered service population makes outreach and service delivery easier and less costly, the proportion of the over 75 and living alone population of the metropolitan area that live in the central city is

another criterion measure. 5. and 6. Giving to the major local fund-raising effort, the United Way, can measure how well the local funding potential is being tapped. Therefore, both the per capita giving to the United Way and the increase in United Way fund-raising in the past year are used as viability criteria. 7. Since the very poor cannot be expected to contribute in appreciable amounts to support any program, the general poverty rate in the community is also a significant measure of financial viability. 8. While individual donors are vital to the life of an agency, major donors are important, also. Therefore the existence of local foundations and corporate giving programs is also used an a criterion.

Viability has other than the financial aspect. It is important, if a new agency is to succeed, to have the local planning agencies approve of its entry into the service network. Any new agency which is not welcomed to a community by the Area Agency on Aging and the local United Way will find it difficult to find individuals needing its services, to raise funds, and to get needed cooperation from other agencies. Therefore, the attitude of these two types of agencies to the program and the coming of Little Brothers was an important criterion. This was assessed by sending letters to each of these agencies asking whether they believed that there was a need for services such as ours in their community. It is important, too, that the other

provider agencies in the community view the new agency as a new resource rather than as a competitor and are willing to work cooperatively with it. There must also be individuals in the community who share the philosophy of the agency and who are willing to work with it to provide the leadership and local viewpoint needed. And lastly, there must be potential for recruiting a significant number of volunteers, and an active and successful local Voluntary Action Program can be extremely helpful.

The need and viability criteria differ in the ease of measurement and the effort needed to collect the information. Therefore, it makes good sense to apply the criteria for which we can get the information easily to reduce the number of possible sites somewhat so that we need seek the hard-to-find information for fewer cities.

In order to minimize the need for collecting hard-to-find data, the selection criteria were divided into a series of four screens, each one requiring greater effort to apply than the preceding one.

The first screen had been applied to bring the number of potential sites down to 23. The second screen, composed of eight need and six viability criteria, further reduced the number of potential sites to 14. The third screen will reduce this number to three. And a fourth screen,

administered in an on-site evaluation, will determine the first new site to be opened. The handouts at the back of the room (on the table here) contain the criterion lists for each of the screens.

I want to add a comment about one of the unexpected results of the research. When the information that we had gathered was examined, we found that our volunteers were different than those profiled in national studies of voluntarism. They were more likely to be female, white, unmarried, college graduates, younger, and with higher incomes than the national profile. In Chicago and Minneapolis, Catholics were over-represented in our volunteer corps, but this was not true in Boston or Houghton.

This difference between the various sites was revealed by the research and it had important implications for the agency and for the operation of the various sites. One of the nice things about research is that sometimes you not only get the answers to the questions you asked, but also observe something quite unexpected that makes you stop to think what might be operating to create that effect. The information about the differences in the characteristics of the volunteers between the four sites, stimulated exchange among the site directors about recruitment methods and volunteer assignments that resulted in changes in procedures and programs.

For this agency, the research provided the opportunity for the agency to take a closer look at its history, its program, and its volunteers. As planned, out of this it was possible to identify factors that could facilitate the development of a new house. Also identified were some of the factors that influence volunteer recruitment and commitment; these in turn effect the ways in which volunteers serve and the allocation of staff time to various activities. Thus the research has implications both for long-term planning for expansion and for immediate evaluation of some current activities. For example, the larger number of unmarried, Catholic volunteers had been assumed to typical of all sour sites, while in fact it was typical only of Chicago. The research also pinpointed the program's failure to recruit meaningful numbers of black or Hispanic volunteers. And, as is usually the case, the presentation of the research findings to staff and Board stimulated discussion and a greater commitment to a planning process that included considerations of what had been and was being done as necessary antecedents to planning for the future.

This example illustrates that an agency can use a research approach to planning for future program changes, whether these be in terms of program expansion or of change of direction or priorities. Many agencies are so involved in

day to day operations, the struggle to continue to provide services during a period of increased need and increased competition for funds, that they believe that they do not have staff and Board time to look carefully at what they want to do and whether they are in fact doing it. The formulation of a research question and of the approach to answering it becomes a first step in the evaluation of the extent to which an agency to doing what it thinks it is, and whether it needs to change its methods, direction or priorities.